

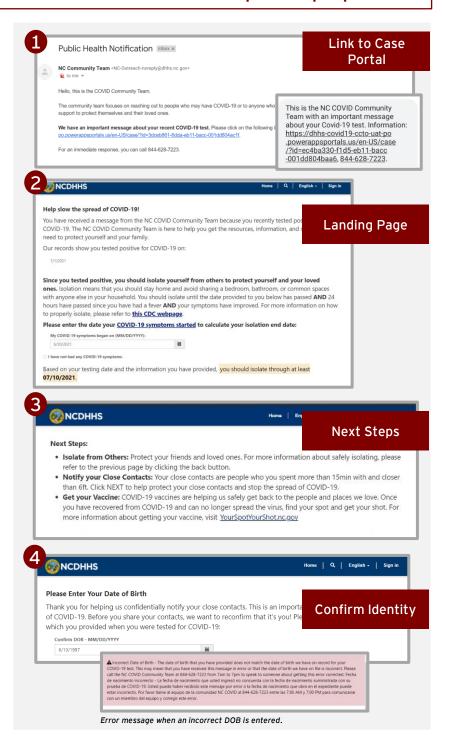
### Understanding the Case Patient Portal

The new case patient portal will allow cases to enter contacts on their phone or computer directly from the digital notification they receive. Read on to understand how this may impact your work.

#### WHAT CASE PATIENTS SEE: Case Notification and Portal

All cases who test positive for COVID-19 and flow into CCTO from NC COVID will be sent an automatic text and/or email notification attempting to inform them of their positive result via a link to a landing page. This link will now be unique to the case patient and allow them to provide a symptom onset date, to calculate personal isolation dates, and to enter contacts. See below for the case patient's perspective.

- Case patient receives a text or email directing them to click a link with information about their COVID-19 test result. This link is now unique to this case.
- 2. Case patient clicks the link and arrives at a unique landing page that lists the date of their positive test and invites them to enter their symptom onset date or to select that they have not had any symptoms. The page automatically uses this information to generate a unique isolation end date for 10 days after the symptom onset date (or 10 days after the test date if no symptoms).
- Case patients who click "Next" will be given three next steps - to isolate from others, to notify their close contacts, and to get the COVID-19 vaccine.
- 4. Case patients who click "Next" will be asked to confirm their identity by entering their date of birth, which was collected at the time of their test. If the case enters a DOB that does not match the one in the system, they will receive an error message at the top of the page and will not be permitted to proceed.



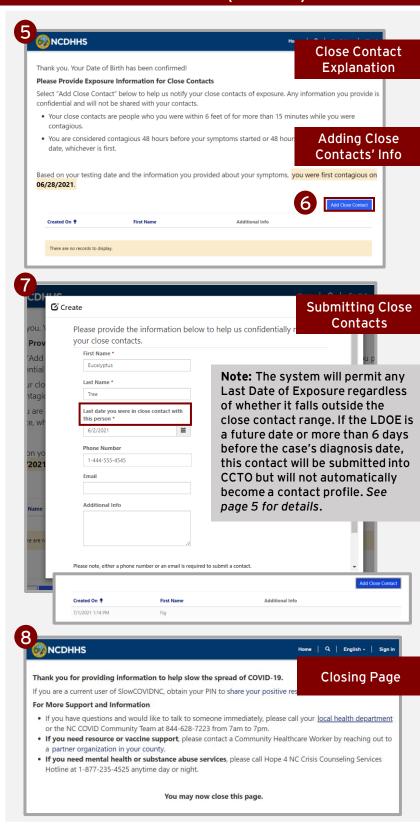


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### WHAT CASES SEE: Case Notification and Portal (cont'd.)

- 5. Case patients who click "Next" will be taken to a page that provides them with a definition of a "close contact" and a calculated date for the start of their contagious period, which is calculated as 48 hours prior to their test date or symptom onset date (whichever is earlier). It also prompts them to submit information about their close contacts so that contacts can be notified of their exposure.
- 6. Clicking "Add Close Contact" provides the case with a form to complete the contact's first and last name, the last date of exposure, a phone number, email, and any additional information the case patient would like to provide via a free text box. First name, last name, last date of exposure, and email OR phone are required.
- 7. Clicking "Submit" will lock this contact and will automatically submit them into CCTO, and this process to submit a contact can be repeated as many times as needed. See page 5 for details on locating this information when it arrives in CCTO.
- 8. Clicking "Next" a final time after adding contacts provides a closing page with information about SlowCOVIDNC, resources for support, and information for contacting the local health department if needed. At this point, the case may close the page. The case patient portal may be re-accessed at any point using the received link.





### **Understanding the Case Patient Portal**

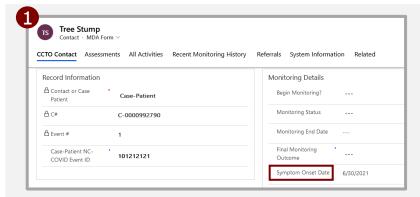
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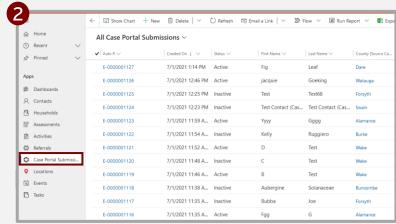
#### FOR ALL CCTO USERS: Locating Info From the Case Patient Portal Within CCTO

Information provided by cases through the case patient portal will update directly within CCTO (NOT NC COVID), and you can use this data to inform your contact tracing or case investigation work:

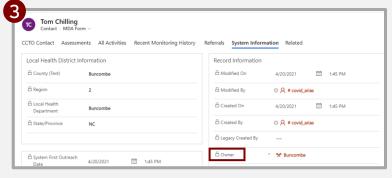
NOTE: As a result of the information required for case patients to utilize the case patient portal properly, Date of Birth and NC COVID Diagnosis Date (which will lock immediately upon completion) are now required fields for all cases within CCTO. If you add an incorrect NC COVID Diagnosis Date, turn the notification toggle off and request support via your admin or ServiceNow.

- 1. When a case patient enters information within the case patient portal, their CCTO profile (which has already flowed in automatically from NC COVID) will reflect a symptom onset date if one was provided. This will be displayed in the new, editable Symptom Onset Date field in Monitoring Details on their profile.
- 2. Contact submissions made by case patients will flow directly from the case patient portal into CCTO in a new location called Case Portal Submissions. All the contacts submitted here will automatically have a contact record created within the Contacts Tab as long as their last date of exposure is the current date or a past date that is no more than 6 days before the case's diagnosis date; therefore, generally, no action is required on this tab.\*
- 3. Within the Contacts Tab, each contact record that is created from the case's submissions will be assigned to the county owner team of the case patient who entered them into the portal.





\*Note on contact submissions that are not automatically accepted: If a case provides an LDOE for a submitted contact that is a future date or that is more than 6 days before the case's diagnosis date, a contact record will not be created automatically; however, the contact information will still be submitted in the portal and can be viewed in the Case Portal Submission Tab in CCTO. A CI should verify with the case whether this person is a true contact. See page 5 for details on how to identify these submissions and generate a contact record from them if needed.



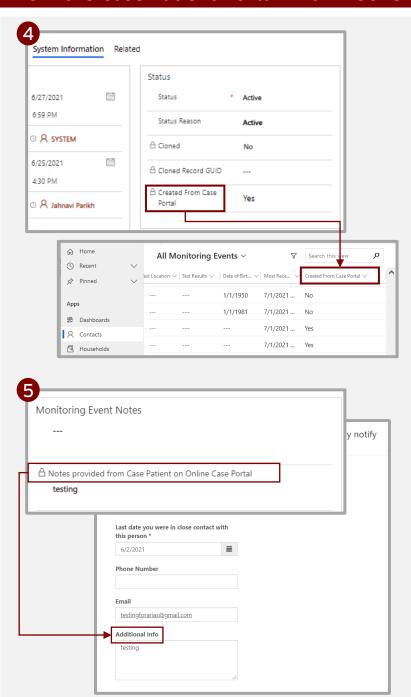


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#### FOR ALL CCTO USERS: Locating Info From the Case Patient Portal Within CCTO

- 4. The new Created from Case Portal field in the System Information page will be toggled to "Yes" for any contacts who have flowed into CCTO from the case patient portal. To display all contacts who originated from the case patient portal within the Contacts Tab, you can filter the Created from Case Portal column at the far right of the All Monitoring Events view.
- 5. Additionally, a new section for notes called Notes Provided from Case Patient on Online Case Portal will appear on the contact record of any contacts created through the case patient portal if the "Additional Information" field was completed by the case during contact submission.



#### FOR ADVANCED USERS AND CASE INVESTIGATORS:

For more information about reviewing case submissions, please see the next page. You should only complete the manual approval process for these submissions if specifically instructed to do so.



### **Understanding the Case Patient Portal**

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#### FOR CASE INVESTIGATORS: Locating Case Patient Portal Contact Submissions

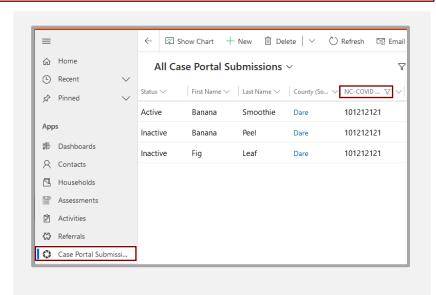
All information regarding any contacts submitted by the case patient is taken by the portal and stored within CCTO; however, not all of these submissions automatically become contacts. Specifically:

- All contacts submitted by the case whose last date of exposure is 1) today or a past date AND 2) no
  more than 6 days before the case's diagnosis date are automatically created as contact profiles within
  CCTO.
- All contacts submitted by the case whose last date of exposure is 1) a future date OR 2) more than 6
  days before the case's diagnosis date are not automatically created as contact profiles in CCTO. If
  needed, you are able to review this submission and convert it into a new contact profile manually.

If you have been instructed to review submission information, you can follow the process below.

Visit the Case Portal Submissions Tab.
The available views filter on whether each submission has become a contact profile.
Note that any contact records that have been accepted as contact profiles (either manually or automatically) are automatically deactivated by the system.

To view all the contact submissions (accepted and non-accepted) for a particular case, you can filter the *All* Case Portal Submissions view by the NC COVID Event ID of Case column.



#### REVIEWING CASE PATIENT PORTAL SUBMISSION INFORMATION:

If you are a CCTO administrator or data manager or if you have been instructed by your local protocol to evaluate case patient portal submissions that have not been automatically accepted as contact records, please see the next page.

You should only complete the manual approval process for these submissions if

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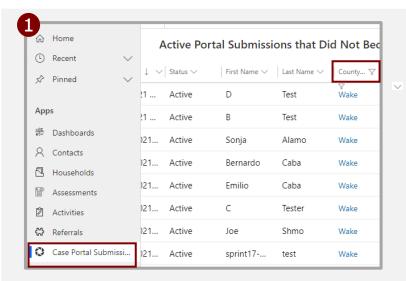
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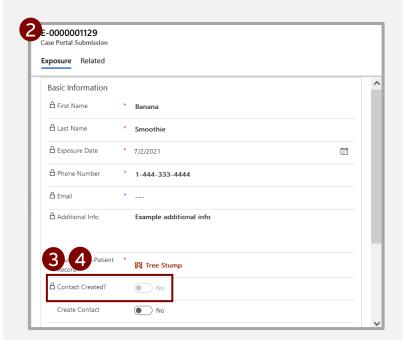
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# **FOR ADVANCED CCTO USERS:** Evaluating Case Patient Portal Contact Submissions

### ONLY COMPLETE THIS PROCESS IF SPECIFICALLY INSTRUCTED TO DO SO.

- To see all active submissions that were not automatically turned to contacts, visit the Case Portal Submissions Tab and click on the Active Portal Submissions That Did Not Become Contact Records view, which serves as a to-do list of non-accepted submissions that must be reviewed. This view can be filtered by the county of the case patient in order to see only your county's submissions.
- Clicking into a submission record within the Case Portal Submissions Tab will display all info and notes submitted by the case for a close contact.
- 3. Within a submission record, the locked **Contact Created?** field shows whether this submission has been converted into a contact profile. If it reads "Yes," then this submission is already a contact within the Contacts Tab, and the field is locked.
- 4. If it reads "No," then the system has not created a contact from this submission. A CI should verify with the case whether this person is a true contact. If a submission is reviewed and determined not to be a true contact, it should be deactivated, which will remove it from the Active Portal Submissions That Did Not Become Contact Records view.







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## **FOR ADVANCED CCTO USERS:** Evaluating Case Patient Portal Contact Submissions

- 5. If a non-accepted submission is reviewed and determined to be a true contact who requires a contact profile, you can manually toggle the **Create Contact** field to "Yes" and save. This creates a new contact profile that will be owned by the owner team for the county of the case patient. All of the fields on the contact submission record are locked, so any necessary changes to this contact's information must be made on the new profile.
- 6. Once this contact is created, the system will automatically deactivate this submission record and lock the Create Contact field so that only one contact profile may be created per each submission.

